NORTEL NETWORKS™

Meridian 1, Succession 1000, Succession 1000M
Succession 3.0 Software

i2050 Software Phone Call Center User Guide

Revision history

October 2003

Standard 2.00. This document is up-issued to support Succession 3.0 Software.

September 2002

Standard 1.00. This document is issued to support Meridian 1 Release 25.40 and Succession Communication Server for Enterprise 1000, Release 2.0.

Contents

i2050 Software Phone 6

i2050 Software Phone features 6

Your Call Control window 7

i2050 Software Phone Call Control windows 7
Enhanced Call Control window 7
Primary User Interface 8
Local Directory Quick Access Tray 13
Combo Tray 15
Number Pad and DN Feature Key Trays 16
Standard Call Control window 17
System Tray Interface 18
Local Directory Interface 19

The i2050 Software Phone display 22

i2050 display areas 22

Agent and Supervisor features 23

Agent Login 23
Login with Agent ID and Multiple Queue Assignments 23
Agent Logout 26

Agent features 27

Answer ACD Calls 27
Call forcing 28
Activity code 28
Emergency 29
Not Ready 29
Answer or Make Non-ACD calls 30
Contact your Supervisor 30

Supervisor features 31

Answer Agent 31
Agent key 32

Answer Emergency 32
Call Agent 33
Interflow 33
Night Service 34
Observe 35
Display Agent Status 36
Display Queue 36

i2050 Software Phone

The i2050 Software Phone is a Windows-based application that enables voice to make your computer a powerful tool. The i2050 Software Phone provides most of the attributes and features of the i2004 Internet Telephone.

i2050 Software Phone features

The i2050 Software Phone supports the following features:

- Twelve programmable feature keys: six Programmable Line (DN)/Feature Keys (self-labeled) and six lines/features accessed by pressing the shift key.
- Four Soft Keys (self-labeled) providing access to ten features.
- Multi-field display.
- Powerful directory capabilities: locally stored on the PC or linked to external directories such as LDAP, Microsoft Outlook, and ACT! contact management software.
- “One-click” direct dialing from various windows and applications.
- Six specialized fixed keys:
  - DN/ Feature Tray selection
  - Directory
  - Inbox (Message)
  - Shift
  - Services
  - Expand to PC
- Dedicated call processing indication keys:
  - Hold
  - Goodbye
  - Answer
  - Volume
  - Mute
  - Navigation
  - Message waiting
- User-selectable ringer that enables the PC speakers or the headset to ring for incoming calls.
- Macro functions for programming lengthy dialing patterns.

Your Call Control window

i2050 Software Phone Call Control windows

To open the i2050 Software Phone window:

From the **Start** button on your computer's desktop, click **Start** > **Programs** > **Nortel Networks** > **i2050 Software Phone**.

The i2050 Software Phone uses the Enhanced and Standard Call Control window modes, a System Tray Interface, and a Local Directory.

Enhanced Call Control window

To open the Enhanced Call Control window:

On the Standard Window Interface, click **Application menu**> **Select Skin** > **Enhanced.**

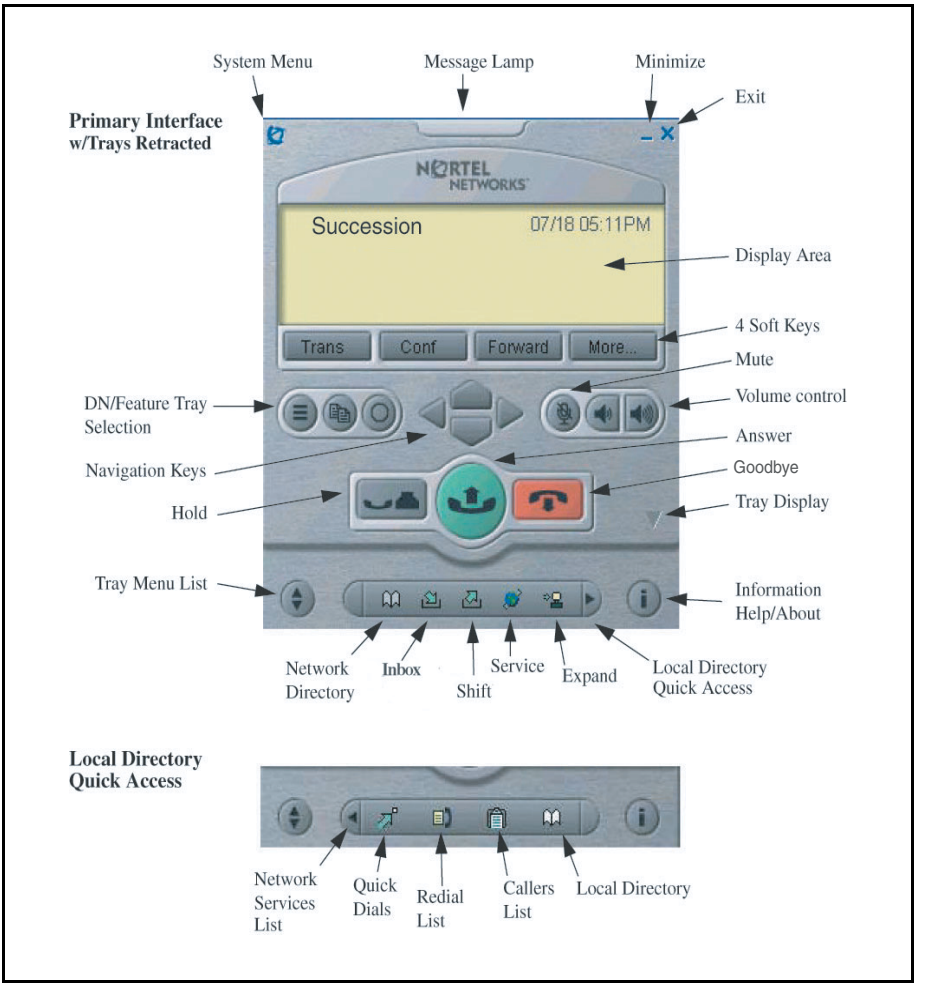
The Enhanced Call Control window contains the following window interfaces:

- **Primary User Interface** contains the main Call Window controls.
- **Local Directory Quick Access Tray** contains lists for local directory, redial, and callers.
- **Combo Tray** contains a dial pad *and* DN/Features selections.
- **DN/Feature Key Tray** contains DN/Features selections.
- **Number Pad Tray** contains a dial pad for making calls.

Primary User Interface

The Primary User Interface is the default window mode for the Enhanced Call Control window and contains the main controls for managing calls. The Services menu containing programmable features such as language selection or date formatting. The DN/Feature Key Tray and Number Pad Tray modes are also accessed through this interface.

Primary User Interface



Primary User Interface controls

The **Application Menu** key (top left-hand corner) accesses the Configuration Utility that configures the i2050 Software Phone. ***Consult your system administrator before changing the configuration.***

The **Message Lamp** displays a *solid light to* indicate that a message is waiting for the user; a *flashing light* indicates an incoming call.

The **Minimize** key minimizes the Call Control window.

The **Exit** key closes the Call Control window while still receiving telephone calls. The i2050 remains running in the background.

There are four soft-labeled feature keys: **Transfer** for connecting calls to other people, **Conference** for group calls, **Forward**, and **More...** for accessing additional features.

The **DN/Feature Tray Selection** key opens the *DN/Feature Key Tray* mode that accesses up to 12 DNs or features (six feature keys display and six additional features can be accessed with the **Shift** key).

The **Copy** key is not used in this release. The **Quit** key is used to quit from the option menu.

The **Navigation** keys enable scrolling through menus and lists in the display area.

Click the **Mute** key to listen to the receiving party without transmitting. Click the **Mute** key again to return to a two-way conversation. The **Mute** key applies to Headset microphones.

The **Volume** keys increase or decrease the headset volume.

The **Hold** key places an active call on hold. The feature key label for the held line displays a flashing icon to indicate the call hold status. Return to the call by clicking the DN key that corresponds to the feature key for the line on hold.

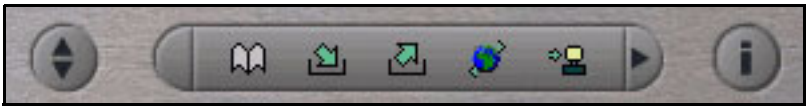
The **Handsfree (Answer call/Make call)** key is used to answer and make calls. Calls can also be answered or made by clicking a DN key in the Lines or Combo trays.

The **Goodbye** key terminates calls (only applicable to active calls).

The **Tray menu** key opens and closes the displayed tray.

Network Services Menu

Use the Network Services menu to access features such as e-mail and Network Directory lists. The Network Services menu is Primary User Interface's default menu view.



The **Tray Menu List** key scrolls through an opened directory menu.

The **Network Directory** key is a fixed-feature key that provides access to network directory options.

The **Inbox** (**Message)** key is a fixed-feature key that accesses voice messages.

The **Shift** key toggles between two feature key displays.

The **Service** key accesses the following features:

- Telephone Option:
  - Language
  - Date/Time Format
  - Ring type
  - Call timer
  - Set Information
- Virtual Office Login and Virtual Office Logout (if *Virtual Office* is configured)
- Test Local Mode and Resume Local Mode (if *Branch Office* is configured)

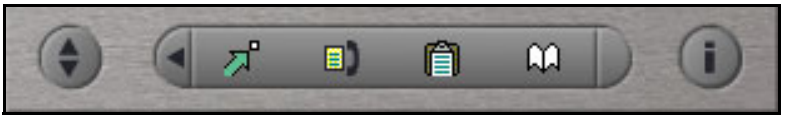
The **Expand to PC** key is not used in this release.

The **Local Directory Quick Access** key opens the Local Directory Quick Access menu.

The **Information/Help** key opens a help file for the i2050 Software telephone.

Local Directory Quick Access menu

Use the Local Directory Quick Access menu to open up lists in the Local Directory.



To open the Local Directory Quick Access menu:

From the **Network Services** menu, click the **Local Directory Quick Access** key (right side of the Network Services menu).

The **Network Services** key returns to the Network Services view.

The **Quick Dials** key opens the Quick Dials directory.

The **Redial** key opens the Redial list.

The **Callers List** key opens the Callers list.

The **Local Directory** (or *Main* directory) key opens the Local Directory menu.

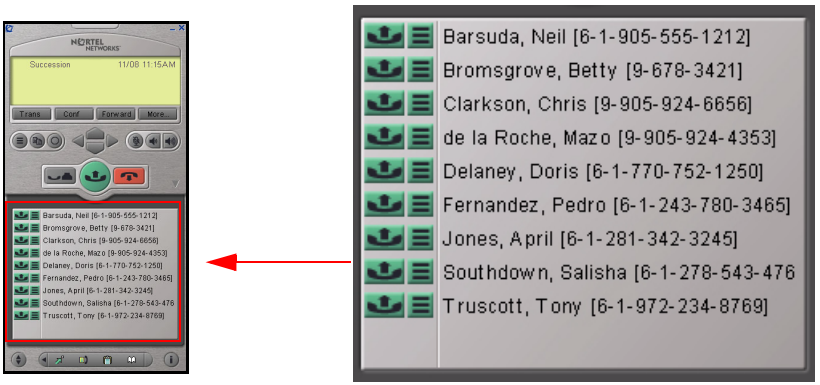
Hot Keys

Within the Primary User Interface, the computer keyboard provides hot keys for one press access to common features:

- answer (Enter)
- release (F12)
- hold (F5)
- softkeys/interactive keys (F1-F4)
- alphabetic keys map to numbers as per dial-pad mapping
- arrow keys map to navigation keys
- Alt-V will paste/insert data to the interface (For example, you can copy a phone number from Microsoft Outlook and paste it into the Software Phone interface.)

Local Directory Quick Access Tray

The Local Directory Quick Access Tray maintains quick dial, redial, and callers lists. Ten items in a list can be viewed.



To open the Local Directory Quick Access Tray:

From the Primary User Interface window:

Local Directory Quick Access

1. In *Network Services* menu, click the **Local Directory Quick Access** key.

Local Directory

2. In the *Local Directory Quick Access* menu, click the **Local Directory** key.

or

From the System Tray Interface:

System Tray

1. Click the *System Tray* icon on your computer's Shortcut bar. This opens the *System Tray Interface*.

2. Click *Local Directory*. This launches the Local Directory Quick Access tray

Combo Tray

The Combo Tray contains the Primary User Interface controls plus a keypad and DN/Feature selections.

To open the Combo Tray:

Click **Application menu**, then select **Trays** > **Combo**.

In-Calls key on the Combo Tray

Click the **In-Calls** key to log in and answer call center calls.

Number Pad and DN Feature Key Trays

Number Pad Tray.

To open the Number Pad Tray:

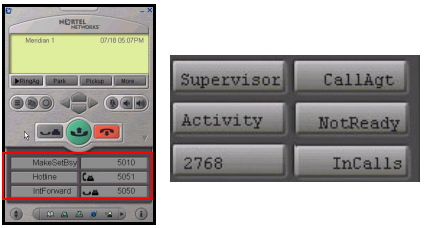
Click **Application menu**, then select **Trays** > **Number Pad**.

The Number Pad Tray contains the Primary User Interface controls plus a keypad. The numeric keypad mimics a regular phone's dialpad.

DN Feature Key Tray

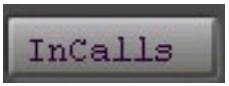
To open the DN Feature Key Tray:

Click **Application menu**, then select **Trays** > **Combo**.



The DN/Feature Tray contains the Primary User Interface controls plus six feature keys. An additional six features are accessed with the **Shift** key.

In-Calls key on the DN/Feature Tray



Click the **In-Calls** key to log in and answer call center calls.

Standard Call Control window

The Standard Call Control window appears by default when the i2050 Software Phone is started. It contains the main features of the Enhanced Call Control window (see Enhanced Call Control window) but without a Network Directory menu.

Standard Call Control window

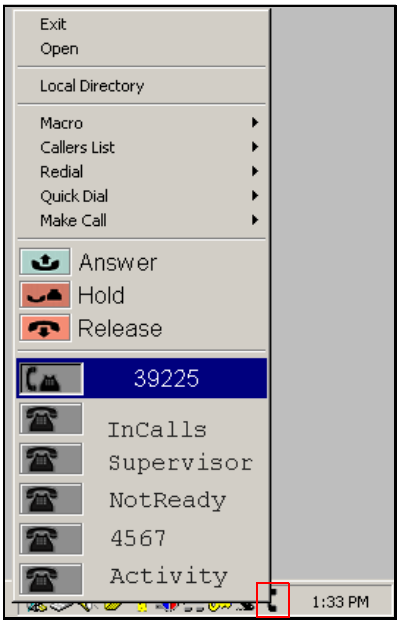
System Tray Interface

The System Tray Interface enables you to answer calls without opening the Primary User Interface.

To open the System Tray Interface:

From your PC's short cut menu toolbar, double-click on the System Tray icon.

System Tray menu:



Exit: Closes and exits the i2050 application.

Open: Opens the Primary User Interface.

Local Directory: Opens the Local Directory Quick Access tray.

Macro: Select a pre-recorded macro to play.

Callers List: Opens a Callers fly-out list.

Redial: Opens a Redial fly-out list.

Quick Call: Opens a Quick dial fly-out list.

Make Call: Opens a Make Call fly-out menu.

Answer: Answers the incoming call.

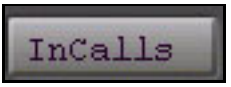
Hold: Places the active call on hold.

Release: Terminates the active call.

Line State icons: Displays the status of the line through changing icon images.

The System Tray icon changes images to reflect the call state.

In-Calls key on the System Tray



Click the **In-Calls** key to log in and answer call center calls.

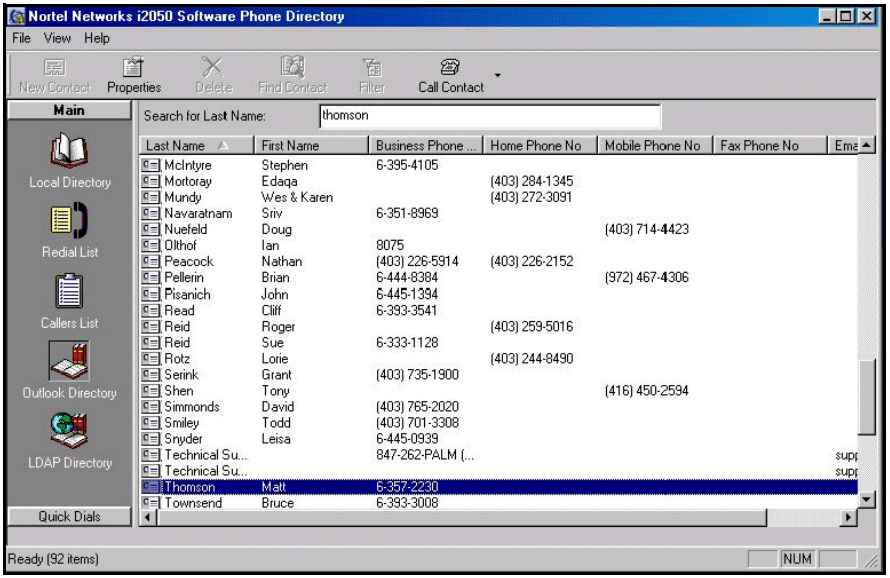
Local Directory Interface

The i2050 Software Phone's Directory Interface maintains the personal directory for placing calls. The directory can be stored within the i2050 application (by default in a local file named Directory.mdb) or linked to external directories such as LDAP, Outlook, Windows Address Book (WAB) and ACT!.

Entries are created, modified, and deleted in the local directory. Entries from external directories, the redial list, and the caller lists can be copied into the local directory.

Directory lists can be “filtered” in simple or complex ways to show, for example, people whose last name starts with 'B' and work for “Nortel Networks”.

Local Directory Interface



To open the Local Directory Interface:

Click **Application menu**, then select **Local Directory** > **Local Directory**.

or

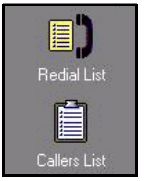
Click **Application menu**, then select **View** > **Local Directory**.

Directory Lists

The Directory Interface contains customized directories and lists located on the left side of the window.

Local Directory

A shortcut that returns to the Local Directory view.



Call Logs

Redials and Callers lists (these are also viewable from the Primary User Tray and the System Tray Interface).

Integrated External Directories

Outlook, LDAP, Windows Address Book (WAB), and ACT!

Entry Management

The Directory Interface features management functions for entries located on a toolbar above the display screen.

New Contact

The **New Contact** key enables new contact entries.

Properties

The **Properties** key enables changes of information for a contact entry (e-mail, address, company information).

Delete

The **Delete** key enables the removal of a contact entry.

Find Contact

The **Find Contact** enables automatic search and find of a contact entry.

Filtered List

The **Filter** key enables sorting of information for a contact entry.

Call Contact

The **Call Contact** key enables the dialing of a contact entry.

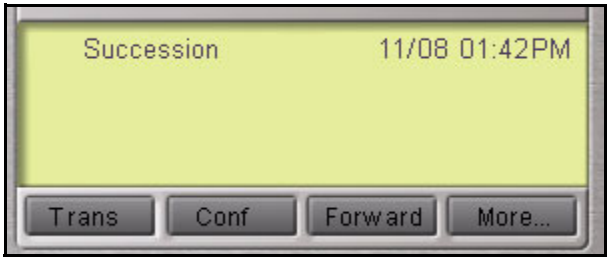
The i2050 Software Phone display

The display is shown in the figure below.

i2050 display areas

The i2050 Software Phone has two display areas:

- The upper display area contains a three-line information display for items such as party and set information.
- The lower display area provides Soft key labels.



Agent and Supervisor features

This section describes the following login features that are common to the Call Center Agent and Supervisor:

- Agent Login
- Login with Agent ID and Multiple Queue Assignments
- Agent Logout

Agent Login

Use the Agent Login to enter a ACD queue. If an Agent ID is assigned to you, the Display screen prompts you to enter a four-digit code.

1. Lift the **Handset**.

In-Calls

2. Click the **In-Calls** key.

Enter Agent ID

3. If "Enter Agent ID" appears on the screen, use the keypad to enter your ID.

#

4. Click the # key. The phone goes into a Not Ready state.

In-Calls

5. To join the ACD queue, click the **In-Calls** key or the **Not Ready** key.

or

Not Ready

Login with Agent ID and Multiple Queue Assignments

A Multiple Queue Assignment (MQA) login consists of entering a four-digit Agent ID and up to five ACD DNs, with an option to add a Supervisor ID and up to five Priority values.

Choose one of the following Login procedures:

- Agent ID and MQA Login Option
- Default Login

Agent ID and MQA Login Option

Use an Agent ID login with one of the following four MQA login options to enter ACD queues.

Note: A Supervisor logging in to accept ACD calls is prevented by the system from entering a Supervisor ID (including logins where agents are required to enter a Supervisor ID).

Login Option Entries

The login options require the following entries:

1. a four-digit Agent ID,
2. *followed* by a Supervisor ID (if your queue requires one),
3. *followed* by up to five ACD DNs and priority values (if priority values are being used), terminated by ##

To Login:

In-Calls

1. Click the **In-Calls** key.
2. Choose one of the following four login options:

   Note: To choose the default Priority or Supervisor ID, enter # instead of a Priority entry or a Supervisor ID entry. The Priority or Supervisor ID for your set is used.

No Supervisor ID, No Priority

Dial your Agent ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.

Supervisor ID, No Priority

Dial your Agent ID # Supervisor ID # ACD DN 1 # ACD DN 2 # ACD DN 3 # ACD DN 4 # ACD DN 5 # #.

No Supervisor ID, With Priority

Dial your Agent ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority 2 # ACD DN 3 # Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 # Priority 5 ##.

Supervisor ID, With Priority

Dial your Agent ID # Supervisor ID # ACD DN 1 # Priority 1 # ACD DN 2 # Priority 2 # ACD DN 3# Priority 3 # ACD DN 4 # Priority 4 # ACD DN 5 # Priority 5 ##.

3. Click the **In-Calls** Key or the **Not Ready Key** to enter the ACD queue.

Default Login

If you normally use the same telephone, use the Default Login to login once at the beginning of a shift. The Default Login uses your previous shift's login to place you in the same ACD queues and with the same Supervisor.

1. Lift the **Handset**.

In-Calls

2. Click the **In-Calls** key.

Enter Agent ID

3. When "Enter Agent ID" appears on the screen, use the keypad to enter your ID.

Supervisor ID Required

# # #

4. Choose one of the following:

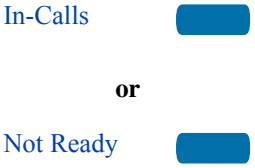
   a. If your queue requires a Supervisor ID, click the # key three times.

or

Supervisor ID not Required

# #

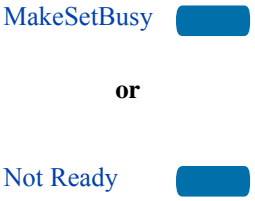
   b. If your queue does not require a Supervisor ID, click the # key two times.



5. To join the ACD queue, click the **In-Calls** key or the **Not Ready** key.

Agent Logout

You can logout of the system either completely or temporarily (Not Ready state):



To log out, choose one of the following:

1. To log out completely, click the **MakeSetBusy** key.
2. To logout temporarily, click the **Not Ready** key.

   Note: If you click the **Make Busy** key while on an ACD call, you are logged out automatically when the call is finished.

Agent features

The following sections describe features that are available to Agents:

- Answer ACD Calls
- Activity code
- Call forcing
- Emergency
- Not Ready
- Answer or Make Non-ACD calls
- Contact your supervisor

Answer ACD Calls

Use the **In-Calls** key to answer the next queued ACD call on the primary DN. The **In-Calls** key is located in the lower right-hand of the programmable line/feature keys.

To answer the call:

1. When the indicator next to the **In-Calls** key flashes, click the **In-Calls** key or press the Enter key on your PC's keyboard.

   Note: The indicator remains lit as long as you are still on the call.

To terminate the call:

To end a call, choose one of the following:

- Click the **Goodbye** key.

or

- Click the **In-Calls** key.

or

- Click the individual **DN** line key. (This removes you from the queue).

or

NotReady

- Click the **NotReady** key (this removes you from the queue but keeps you logged in as an agent position) or wait for the caller to terminate the call.

or

F12

- Press F12 on your PC's keyboard.

Call forcing

Use the Force Call feature to automatically connect an incoming ACD call. A time interval is set by your system administrator between each incoming call.

In-Calls

When calls come in, a short tone indicates the new call. The In-Calls indicator lights continuously and the ACD call automatically goes to your agent position.

Clicking the **In-Calls** key with Call forcing (Auto Answer) on disconnects an active ACD call.

Activity code

Use the Activity code to record the type of activity you are performing.

Activity

1. When the Activity indicator flashes, click the **Activity** key.

2. Use the keypad to enter the Activity code.

Activity

3. Click the **Activity** key again.
4. If performing multiple tasks, repeat these steps.

If configured, Activity codes can be entered while in the Not Ready state.

Emergency

Use the Emergency feature to contact your supervisor immediately in an emergency situation.

1. During an active call, click the **Emergency** key.

   Note: The Emergency indicator remains lit as long as the feature is active.

   When the supervisor picks up, a three-way call commences with you, the supervisor, and the caller.

2. Click the **Emergency** key again to transfer the caller to the supervisor and terminate your access to the caller and supervisor.

Not Ready

Use the Not Ready feature to take your telephone out of the call queue while completing post-call work.

1. Click the **NotReady** key to temporarily logout of the system.

   Note: The NotReady indicator remains lit as long as the feature is active.

2. Click the **NotReady** or **In-Calls** key to return to the queue.

or

Answer or Make Non-ACD calls

This feature enables you to use your individual line to receive and place calls.

To place a call:

1234

1. Click your individual **DN** key.

2. Use the keypad to dial the telephone number.

   Note: The indicator remains lit as long as you are still on the call.

To answer the call:

1234

When the indicator next to your individual DN key flashes, click the **DN** key.

Note: The indicator remains lit as long as you are still on the call.

Contact your Supervisor

Use the Supervisor feature to talk to your supervisor in the following ways:

- Answer a call from your supervisor.
- Answer a call from your supervisor when on another call.
- Place a call to your supervisor.
- Conference your supervisor in when on another call.
- Transfer a call to your supervisor.

Answer a call from your supervisor

Supervisor

When the indicator next to the **Supervisor** key flashes, click the **Supervisor** key.

The indicator remains lit as long as you are still on the call.

Supervisor features

The following sections describe features that are available to Supervisors:

- Answer Agent
- Agent key
- Answer Emergency
- Call Agent
- Interflow
- Night Service
- Observe
- Display Agent Status
- Display Queue

Answer Agent

Use the Answer Agent to receive calls from Agents in a non-emergency situation.

AnsAgent

1. When the indicator next to the Answer Agent key flashes, click the **Answer Agent** key.

   Note 1: The Agent ID of the individual contacting you displays on your telephone.

   Note 2: The indicator remains lit as long as you are on the call and your status changes to NotReady.

2. Click the **Goodbye** key to end the call.

Agent key

Use the Agent feature to connect, observe, or monitor the status of each agent position. Each **Agent** key links to a particular agent position and can be used along with the **Call Agent** or **Observe Agent** keys.

Agentkey

Click the **Agent** key. The Agent's status displays as follows:

Indicator Display	Meaning
Off	Agent is not logged in.
On	Agent is logged in but is either Not Ready or on a call.
Slow Flashing	Agent is waiting for an ACD call.
Fast Flashing	Agent is on a non-ACD call.

Answer Emergency

Use the Answer Emergency feature to receive calls from agents in an emergency situation.

AnsEmreg

1. When the indicator next to the Answer Emergency key flashes, click the **Answer Emergency** key.

   Note 1: The Agent ID of the individual contacting you displays on your telephone.

   Note 2: The indicator remains lit as long as you are on the call and your status changes to NotReady.

2. Click the **Goodbye** key to end the call.

Call Agent

Use the Call Agent feature to contact an Agent.

CallAgt

Agentkey

or

1. Click the **Call Agent** key.
2. Click a selected **Agent** key or dial the agent's Position ID.
3. Click the **Goodbye** key to end the call.

Interflow

Use the Interflow feature to redirect calls when the backlog or wait time exceeds a pre-defined threshold.

Interflow

Interflow

1. Click the **Interflow** key.

   Note 1: The Interflow indicator flashes while the feature is active.
2. Click the **Interflow** key again to deactivate the feature and resume normal call flow.

Night Service

Use the Night Service feature to define how calls are handled outside of business hours.

Activate Night Service

1. Click the **Night** key.
2. Click the **6** key (6=N for Night) to go into Night Service.

   The Night Service indicator lights continuously. All calls in the queue and new calls receive night service.

Transition to Night Service

1. Click the **Night** key.
2. Click the **8** key (8=T for Transition) to activate Transition mode.

   The Night Service indicator flashes. All calls in the queue remain in the queue and new calls receive night service.

Deactivate Night Service

1. Click the **Night** key.
2. Click the **3** key (3=D for Day) to resume Day mode.

   The Night Service indicator flashes. New calls enter the queue.

Observe

Use the Observe feature to monitor an agent in a call.

ObvAgent

1. Click the **Observe** key.

Agentkey

2. Click a selected **Agent** key or dial the agent's Position ID.

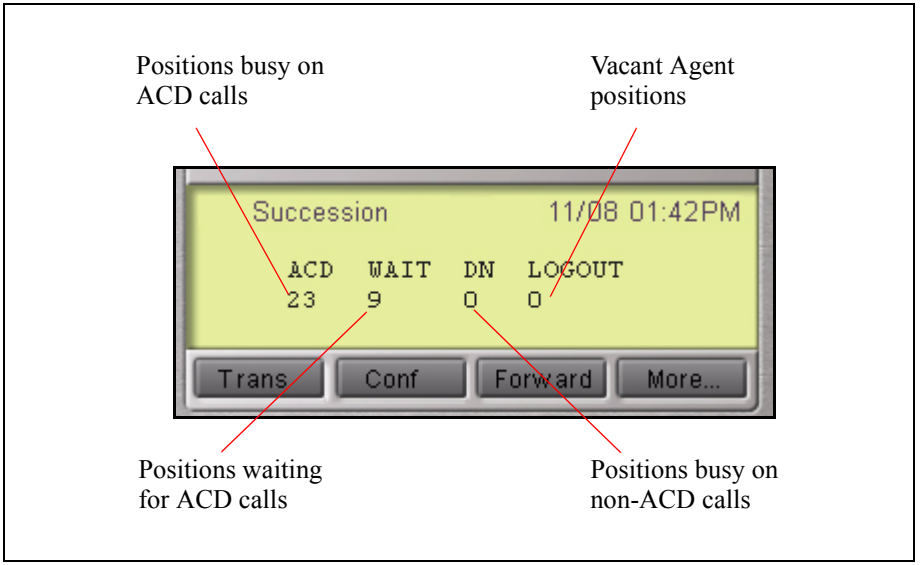
or

CallAgt

3. Click the **Call Agent** to talk to the agent you are monitoring.

ObvAgent

4. Click the **Observe** key to terminate the observation.



Display Agent Status

Use the Display Agent feature to view a summary of current status for all agents that have an agent Position ID key assigned on the Supervisor's telephone.

DisplayAgt

Click the **Display Agent** key. The display summary information displays for twelve seconds or until another feature key is clicked.

Agent positions in the Not Ready state are counted as busy on either ACD calls or non-ACD calls, as specified by your system administrator.

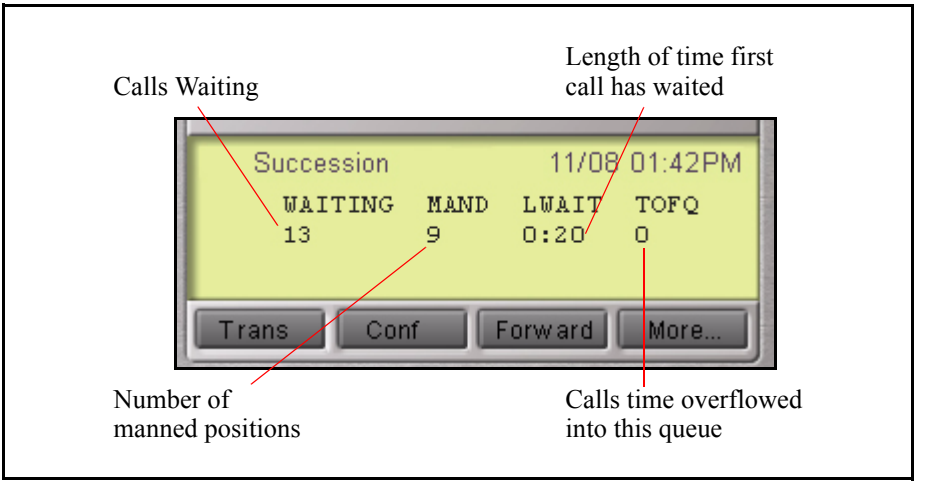
Display Queue

Use the Display Queue feature to view the status of the number of calls waiting in the queue.

DisplayQue

Click the **Display Queue** key.

The queue's status appears on your telephone display:



The indicator beside the Display Queue key gives a visual indication of the number of calls in the ACD queue. The following table lists the four states for this indicator:

Indicator	Queue Status	Meaning
Off	Light	There are few or no calls waiting.
On	Normal	An acceptable number of calls are waiting.
Slow Flashing	Busy	Calls are backing up in the queue. Calls overflowing to this queue are not being accepted.
Fast Flashing	Overloaded	Too many calls in this queue. New calls are being overflowed to another queue.

Meridian 1, Succession 1000, Succession 1000M

i2050 Software Phone Call Center User Guide

Copyright © 2001 – 2003 Nortel Networks
All Rights Reserved

Information is subject to change without notice. Nortel Networks reserves the right to make changes in design or components as progress in engineering and manufacturing warrant. This equipment has been tested and found to comply with the limits for a Class A digital device pursuant to Part 15 of the FCC rules, and the radio interference regulations of the Industry Canada. These limits are designed to provide reasonable production against harmful interference when the equipment is operated in a commercial environment. This equipment generates, uses and can radiate radio frequency energy, and if not installed and used in accordance with the instruction manual, may cause harmful interference to radio communications.

Operation of this equipment in a residential area is likely to cause harmful interference in which cast the user will be required to correct the interference at their own expense.

SL-1, Meridian 1, and Succession are trademarks of Nortel Networks.

Publication Number: P1002825

Document Release: Standard 2.00

Date: October 2003

Produced in Canada

NORTEL NETWORKS™

Internet address
http://www.nortelnetworks.com